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ABSTRACT

This guide was developed to help small business owners and managers select effective programs for their companies. Seven guidelines to help the small business manager analyze and compare programs and predict training effectiveness are presented in the forum of questions. They are: (1) Are the training objectives specific? (2) Is the structure logical? (3) Can you measure the learning? (4) Does the training method suit the content? (5) Does the program allow active participation? (6) Does the program use examples and materials from employees' jobs? and (7) Do employees get feedback on their performance? These guidelines are based on training principles derived from many years of research with adult learners and from the experiences of professional trainers and educators. As each guideline is introduced, its corresponding training principle is described, and examples from real training courses are provided. The book is organized in four chapters. The first two short chapters deal with preliminary considerations: chapter 1 asks if training is the answer to improving the situation, and chapter 2 helps the manager define the company's constraints on cost and scheduling and then presents some ideas about where to find potential programs and how to collect information about them. The third and central chapter introduces the seven guidelines, showing how they can be used to analyze and compare the training and education programs that have been identified and discusses each guideline and the training principle on which it is based. The final chapter discusses several techniques for making certain that employees apply what they learned from the training to their jobs. The book also includes a checklist of the guidelines that can be used to analyze and compare different training and education programs. (KC)

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Choosing the right training program

A guidebook for small businesses

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Contents

Introduction:

What will this book tell you? 1

1 *Is training the answer? 5*

2 *How do you begin? 9*

3 *Which program is best? 17*

4 *How do you make it last? 39*

Introduction . . .
What will this book tell you?

Small businesses may often lack the expertise and the resources to develop their own training and education programs. Yet, just like large companies with big staffs and big budgets, they need to continually upgrade their workplace skills to stay competitive. To meet these training and education needs, small businesses frequently purchase programs developed by training professionals and educational institutions.

Fortunately, there are usually many training and education programs to choose from. Unfortunately, they're not of equal quality. Some programs are very good, some are not very good, and most fall somewhere in between. So, the training buyer, like any other shopper, must be well-informed to buy smart.

We designed this book to help people who have little or no training experience select *effective* programs for their companies — in other words, to become smarter buyers. Although we wrote it specifically for the training decision-maker in small businesses, the guidelines we've developed to analyze programs can be useful for larger businesses and experienced training specialists as well.

In general, we recommend setting aside time to read this book from beginning to end. If you are an experienced training specialist, however, you may want to read the book selectively, choosing sections most applicable to you.

What are training guidelines?

In this book, you'll find seven guidelines to help you analyze and compare programs and, ultimately, predict training effectiveness. These guidelines are based on training principles derived from many years of research with adult learners and from the experiences of professional trainers and educators. Training and education programs that incorporate these principles are usually effective.

As we introduce each guideline, we describe its corresponding training principle, explain it, and give examples of what to look for. To help you understand the principles and easily apply them to programs, we wrote the guidelines in plain English and used examples from real training courses.

How is this book organized?

Chapter 1: Before you begin . . . is training the answer?

Before you start researching training and education programs, you should be certain that training is what your company needs. Although this book assumes that your company does have a training need, this short chapter cautions you to first make sure that the situation can be improved with training.

Chapter 2: So you have a training need . . . How do you begin?

This chapter helps you define your company's constraints on cost and scheduling. It then gives you some ideas about where to find potential programs and how to collect information about them.

Chapter 3: Which program is best?

This chapter is the heart of the book. It presents the seven guidelines that you'll use to analyze and compare the training and education programs that you've identified. It

discusses each guideline and the training principle that guideline is based on.

Chapter 4: After the training . . . How do you make it last?

When the program is completed, how can you be sure that employees will be able to apply what they learned? This chapter discusses several techniques for making certain you get your money's worth from the training.

The checklist

At the end of this book, where it's easy for you to find and photocopy, we've listed the guidelines in checklist form. This checklist gives you a quick and organized way to analyze and compare different training and education programs.

1

Before you begin . . . Is training the answer?

No matter what business a company is in — manufacturing, selling, or providing a service — sooner or later it will likely find itself in one or more of these situations:

- Sales are decreasing.
- Customer complaints are increasing.
- New equipment is being installed.
- New employees are being hired.
- New government regulations are coming into effect.
- Staff turnover is increasing.
- Employee morale is sagging.
- Error rates or scrap rates are increasing.
- International competitors are winning more customers.
- Employees are being hired whose primary language is not English.
- A local competitor is updating its computer system.
- A large customer is stressing Total Quality Management.

At first glance, a company could address any of these situations by providing employee training. But before beginning a search for suitable programs, be certain that training is what your company really needs. For example, error or scrap rates often increase when employees don't do what

they are supposed to, or they do it at the wrong time. Such performance issues could be caused by the distribution of work, faulty machinery, or the work flow. Fix these, and you may not need additional training.

Remember, too, that the same incident may have a different cause in different companies. A high turnover rate, for example, could be caused by a lack of training in your company and a lack of benefits at the firm next door. Consider these widget competitors.

Widget Manufacturing, Inc.

Widget's equipment breaks down frequently. The equipment is only two years old and is still under the manufacturer's warranty. The manager investigates and finds that, according to equipment records, employees are not following maintenance procedures. The manager further discovers that the employees who were trained when the equipment was installed have left the company, and the current employees could not explain what the maintenance schedule is. To correct the problem, he institutes a maintenance course for any employee who works on the machinery. The following year, the equipment only breaks down once.

Widgets–R–Us, Inc.

Like Widget Manufacturing, the equipment at Widgets–R–Us also breaks down frequently. The manager investigates and finds that, unlike Widget Manufacturing, the employees have followed strict maintenance procedures. Instead, constant use has caused an ever-increasing breakdown of small parts. The manager also discovers that the equipment is ten years old and has exceeded the expected life span. The manager decides to phase in new equipment over several years. As the machines are replaced, the amount of down-time drops quickly.

Widgets USA, Inc.

Across town, the equipment at Widgets USA is not operating at the expected performance level. The best employees seem to quit their jobs after a few months. Upon interviewing several employees, the manager discovers that employees are leaving for better medical benefits at other companies. After Widgets USA improves its medical benefits, employee turnover drops and equipment operations gradually reach the expected level of productivity.

The moral of these stories is that training will not solve every need in your company. In some cases, training might actually be a waste of your company's resources and your budget. Whenever a need arises, research it

carefully to find the cause. Then, research it further to identify all possible solutions.

The method for investigating whether training is the best solution for a need at work is called *training needs analysis*. If you aren't skilled in conducting a needs analysis, some questions to ask are:

- What things could cause the situation?
- What can be eliminated as possible causes?
- In what ways could lack of training be a possible cause?
- If more than one cause is possible, is there someone else inside or outside the company who can better analyze the situation?
- If training is needed, what kind of training will help and who should be trained?
  - — Do employees need training to improve technical skills?
  - — Do managers or supervisors need to become better managers or planners?
  - — Do sales and marketing staff need training to improve their sales techniques?
  - — Do employees need basic skills education to improve their ability to read, write, and compute on the job?

As you investigate the need, involve the employees and their supervisors. Employees who know why they are attending a program will generally be able to derive more benefits from it. Similarly, the support of the supervisor is very important for ensuring that new skills learned are then transferred back to the job.

2

So you have a training need . . . How do you begin?

When you are certain that training or education will address your company's need, you must first identify the type of training necessary — such as leadership, basic literacy, sales, or equipment operation. Because the situation determines the type of training your company needs, this decision is usually your easiest.

Next, you must find the *right* training or education program. To search systematically, follow these steps:

1. Determine your company's expectations and limitations.
2. Locate possible sources for the training you need.
3. Gather as much information from those sources as possible about the programs you're interested in.

After you've completed these three steps, you'll use the guidelines in Chapter 3 to analyze and compare the programs based on the information you've gathered. Obviously, the more information you gather about the programs, the easier it is to apply the guidelines.

Determine your company's expectations and limitations

When any company, large or small, buys a program, it expects to see results. To select the program that best meets your company's needs, you must understand these expectations. These expectations are often identified during the needs analysis and may be self-evident. For example,

- If you need a literacy program, does the company expect employees only to understand posted warning signs or to read a complex procedures manual?
- If you are training employees on new equipment, what level of proficiency does the company expect?
- If you need sales training, is the company looking for higher sales figures or fewer customer complaints?

Although you may think you understand your company's expectations, write them down and keep them nearby while you're looking for the right program. If possible, quantify them. By how much does your company want sales to increase? How much more efficiently should employees operate equipment? The more measurable the expectations, the easier it will be to decide which program can meet your needs.

In addition to knowing your company's expectations, make sure you understand the limitations that you must work around while finding a program. At the very least, consider

- Cost
  Training funds are often limited. How much is your company willing to spend on a given employee or for a program? Is there a range of costs that can be weighed in the decision? Is there an absolute ceiling?
- Location
  Where do you want the training to be held? Must it be done at your company? Would employees get more from the training if it were held off the premises? Are there funds to send employees elsewhere? Across town? To another city?

- Schedule
  Several aspects of the schedule can be important. First, when do you want the training to be given? Should it be given during the work day? After hours? On weekends? Second, how soon do you need the program? Next week? Next month? Third, how long can the program last? A few hours? A day? A week? And finally, how long can the company have employees in training without losing valuable production time?

List your company's expectations and limitations, and keep them in mind when searching for the right program. By listing your company's expectations and limitations *before* talking to training vendors, you will stay focused on *your company's* needs rather than on the vendor's selling points.

Locate possible sources for training

Programs and services are available from a variety of sources. Here is a list of where to look.

National training companies

These are companies that develop training courses, deliver training, and provide other services on a national, or even international, scale. They typically have programs available on a wide variety of business topics. These companies usually have marketing departments and advertise nationally. Look for their ads in national training publications or for the flyers they send in the mail.

Local training vendors

These companies are found in most large cities. Usually, they are quite small, with only a few employees. Although they may provide training services to companies outside their geographical area, most concentrate on serving businesses nearby. These companies often advertise locally. Look in the yellow pages of your local telephone directory.

Community colleges

These two-year colleges are located in urban, suburban, and rural areas. Many offer courses of general interest to businesses, and some will develop courses in specific technical areas of importance to local businesses. You probably are familiar with the community colleges in your area. If not, just ask your colleagues.

Adult education programs

If you need a program in basic skills or English-as-a-second language, a good place to look is adult education programs sponsored by the local school system.

Trade and professional associations

Some industry-specific organizations offer training for their members. The training typically relates to specific issues and needs of companies belonging to the organization, although some associations offer training in business topics of wider interest. Ask other people in your industry for the names of these associations.

Local business organizations

In most communities, you'll find a local chapter of the Chamber of Commerce or other business or professional associations. These organizations often provide training to members for a fee. Look for these organizations in your local telephone directory or talk to other local business owners.

Labor organizations

Many unions offer programs to their members to upgrade their skills, usually at a low cost. If you have a union in your workplace, this may be a good place to start.

Commercial and trade schools

These are found in most large cities and other areas as well. The training offered focuses on the skills and knowledge needed for specific types of industry and business. Look in the yellow pages of your local telephone directory.

People you know

Your colleagues who work in other companies or the people for whom they work are always a good potential source of information on training programs. Ask them if they ever had training in the subject matter you're interested in, what training company they used, and if they were satisfied.

Looking at such a list of sources obviously doesn't tell you where to find the best training for your needs. A community college, for example, might offer excellent training in one business area, but not others. Some national training companies might offer a better quality of training than a local vendor, yet the vendor may be more willing to tailor a program to meet your needs. Therefore, although each source listed above might offer a program that suits your needs, each has advantages and disadvantages. The table on page 14 summarizes the typical advantages and disadvantages of each source.

Comparing the sources of training and education

Source	*Advantages*	*Disadvantages*
National training companies	■ Program has usually been given to a wide audience and revised over time	■ Can be very expensive ■ Sales personnel may try to sell you a program regardless of your needs
Local training vendors	■ Cost will tend to be lower than for national training companies ■ You can frequently speak directly with the owner about your concerns	■ Can be hard to reach these companies — often there is only an answering machine ■ May be difficult to get program information from available materials
Community colleges	■ Cost is lower than for many other alternatives ■ Many programs are offered — likely to find one that suits your need	■ Courses may not be at convenient times ■ Courses may be too academic
Adult education programs	■ Good choice for basic skills programs ■ Cost is low	■ Courses may only be offered in the evening
Trade or professional associations	■ Training is usually specifically related to your business	■ Training may not be available locally
Local organizations, such as the Chamber of Commerce	■ Programs may suit local interests and speak to local concerns, such as safety regulations	■ Programs may not be specifically related to your business
Labor organizations	■ Programs are developed for specific group of workers ■ Programs are usually convenient to attend	■ Programs may be available only to union members
Commercial and trade schools	■ Focus of programs is sharply defined	■ Individual courses may not be available, only entire programs
People you know	■ Easy to get information ■ Easy to explain your needs	■ Acquaintances may not be the best judges of training quality

Collect and evaluate information

Before you can evaluate potential programs, you must find out as much as possible about them. The more information you have, the better the decision you can make about how well the program will meet your company's needs and expectations while staying within its limitations. You have the right, and the obligation, to learn as much as possible about the available programs before making a decision.

Your first source of information may be a brochure on the program. This is a good place to start, but you only receive limited information. You also can

- talk to a representative of the organization either by phone or in person;
- ask for marketing materials or catalogues and read them thoroughly;
- get copies of actual training or education materials, such as lesson outlines, exercises, or videotapes;
- observe the program being given to another group; and
- call other companies who sent employees to the program you're considering to find out whether they were satisfied.

Of these, observing the program or getting copies of actual training materials will give you the most complete information on which to base your decision. Talking to other companies will give you helpful information, but you must be certain that those companies' needs were the same as yours. While marketing materials are also helpful, they are written to promote the programs and might not have all of the information you need. In the same way, sales representatives should be able to answer all of your questions, but their objective is selling the programs, so you may find it difficult to get a balance of information.

3

Which program is best?

Now that you've gathered materials on the training or education programs that might suit your company's needs, how do you decide which one is best?

This chapter presents seven guidelines that you can use to analyze and compare programs using the information that you've already collected. These guidelines are

- Are the training objectives specific?
- Is the structure logical?
- Can you measure the learning?
- Does the training method suit the content?
- Does the program allow active participation?
- Does the program use examples and materials from the employee's job?
- Do employees get feedback on their performance?

Each guideline describes an established training principle that has been proven to facilitate adult learning. The principles relate directly to quality training. Not every training or education program will incorporate every training principle to the same degree, but the more a program incorporates these principles, the more effective you can expect that program to be.

These seven guidelines tell you what to look for in the training and education materials you've gathered to tell how well a program incorporates each training principle. These guidelines also give you examples to show you the difference between programs that do a good job of incorporating these principles and programs that don't.

How to use the guidelines

- Understand the guidelines.

  Before you begin to analyze and compare the programs you're considering, become familiar with each of the guidelines — what each guideline includes, and what you should look for when you evaluate how well each guideline's training principle is covered in each program.

- Photocopy the checklist.

  Page 20 shows the guidelines in a checklist format. Next to each guideline are three blanks where you can rate how well each guideline's training principle is incorporated in the programs you're considering. At the end of this book, where it's easy for you to find and to photocopy, is another copy of the checklist. Photocopy the checklist whenever you have a training need and use it to compare as many as three different programs at once.

- Rate the programs.

  We've phrased each guideline as a question. To rate the training or education programs you're considering, look for the answers to those questions in the materials that you have collected about each program. Keep the checklist in front of you when you observe a program that you're considering. Take it with you when you talk to a representative from the training organization.

  Rate each program in whatever way best serves your particular purpose. For some training needs, you may want to assign a number. For example, you might use 1 to 5 to

rate how well each program can answer each question on the checklist. To select the best program, simply add the ratings in each column. For other training needs, you may only want to place a checkmark next to the guidelines that each program fulfills. To select the best program, count the number of checkmarks in each column.

- Compare your company's expectations with each program's cost and availability.

  In addition to rating each program, you will want to compare the cost to find one that fits within your company's budget. You also will want to compare the schedule and location of the programs. When the course is offered and where it is held also are important factors to weigh in the decision.

- After you have made your decision, keep the checklist on file so you have a record of why you selected that program.

Checklist

Your company's expectations and limitations

Training expectation _____

Training budget _____

Travel budget _____

Date needed _____

Time of day needed _____

Location needed _____

	Program 1	Program 2	Program 3
Guidelines			
1. Are the training objectives specific?	____	____	____
2. Is the structure logical?	____	____	____
3. Can you measure the learning?	____	____	____
4. Does the training method suit the content?	____	____	____
5. Does the program allow active participation?	____	____	____
6. Does the program use examples and materials from the employee's job?	____	____	____
7. Do employees get feedback on their performance?	____	____	____
Total ratings	____	____	____
Does the program meet your company's expectations?	____	____	____
Training cost	____	____	____
Travel cost	____	____	____
Dates available	____	____	____
Times available	____	____	____
Location	____	____	____

Guideline 1: Are the training objectives specific?

Before you can evaluate any program, you must know what it teaches. A good program will have clearly defined goals, purposes, or objectives. By reading the materials you've collected or by asking a training representative for these intentions, you should be able to identify specifically what your company's employees will learn from this program.

You'll probably find that most programs do state their objectives, but that they do so in very general terms and are usually quite vague about what employees will be able to do when the program is completed.

What to look for

- ✓ Do the training objectives describe what your employees will be able to *do* when they complete the program?

  An example may be that they will be able to start a machine within two minutes, or that they will able to back a truck to the loading pier.

- ✓ Do the training objectives specifically list things your employees will *learn* during the training?

  For example, your employees will learn how to compute interest, or to apply the rules from page 10 of the personnel manual for tardy workers.

- ✓ Can the training objectives be *measured* so that you can test if the objectives were met?

  For example, you can measure if your employees really start a machine in two minutes, or if they turn to page 10 of the personnel manual when a worker is tardy.

Some examples

Objectives from a training course in business writing

Objective A

After completing the course the student will be able to distinguish between sentences written in the active voice (i.e., we will pay the bill in 30 days) and sentences written in the passive voice (the bill will be paid by us in 30 days).

Is this a good objective? Yes, because the objective states exactly what your employees will be able to do when the course is completed. You'll be able to observe whether your employees can do this.

Objective B

This course will train students how to be clear and creative writers. Students will be able to write reports that your customers can easily understand.

Is this a good objective? No, because the objective does not state precisely what your employees will be able to do after training. Instead, it focuses on words that are defined differently by almost everyone. What is a "clear" writer? Clear to whom? What does "creative" mean? How will you know whether your customers understood the reports better than before?

Objectives from a word processing training course

Which is the better training objective, A or B?

Objective A

After the course, students will be able to use all features of the program including **edit**, **merge**, **save**, and **print**.

Objective B

After completing the course, students will be able to

- add footnotes to a document and print them with the correct numbers and in the correct place at the bottom of the page; and
- change fonts within a document.

Objective B is the better objective because it is specific. It describes actual behaviors — such as, "add footnotes" or "change fonts" — that your employees should be able to do after training. **Objective A**, on the other hand, is very general. What will employees be doing when they "merge" or "save"?

Objectives from an electrician apprentice training course

Which of these objectives is better, A or B?

Objective A

When working on a light pole with "hot" wires, the students will work in a safe manner when they replace transformers.

Objective B

When working on a light pole with "hot" wires, the students will use 6-foot insulated sticks to clamp the hot wire and push it away from the working area of the transformers.

Objective B is the better objective because it specifically states what your employee should use and do when working around "hot" electrical wires. **Objective A** does not pinpoint how to "work in a safe manner."

Guideline 2: Is the structure logical?

To be effective and promote learning, a program must present the course material in a logical order. The training material or marketing literature that you've collected should list the topics that are covered. If they don't, ask the representative. Look at the order in which these topics will be taught. Each topic should build on the one before. Look too at the material covered within each topic. Does the material seem appropriate for that topic?

What to look for

- ✓ Does the program present general concepts before introducing specific ones?

  It's difficult to understand the details when you haven't seen the big picture. For example, a course on maintenance procedures for a machine should begin with an overview of the machine and its components before it explains how to replace the inner gear box of the machine.

- ✓ Does the program present the simpler topics before the more complex ones?

  A course that teaches how five components work before it teaches how to troubleshoot the components is logical. A lesson unit on how to use blueprints to detect construction faults should not come before a lesson unit on how to read blueprints.

- ✓ Does the program follow the sequence of skills that employees will use on the job?

  A good program starts at the beginning. For example, a program on sales techniques that teaches how to make opening statements on a sales call before it teaches how to close the sale is logical. A program on the six-step procedure for equipment startup in a factory is not logical if it teaches step four of the procedure before step one.

✓ Is the amount of time allotted to each topic appropriate?

Most adult learners and most experienced workers have a foundation of knowledge or skills when they enroll in a program. Be sure that the program doesn't spend an excessive amount of time covering material that they already know, or that it spends more time on unimportant than important topics.

An example

Shown below are the lesson units and subjects taught in two different courses for operating the XS5000 computers. Which course is more appropriate?

Training Course X
Course Outline

1. Overview of XS5000 operations (30 minutes)
2. User interface (1 ¼ hours)
   - Getting started
   - System menus
   - Getting help
3. Operator commands (2 ¾ hours)
   - Command anatomy
   - Parameters and values
   - Prompting
4. Job management (1 ½ hours)
   - Batch
   - Interactive
   - Initiation
   - Tracking
   - Queue control
5. Summary and troubleshooting (1 hour)
   - Error messages
   - Restoring the system
   - New releases

Training Course Y
Course Outline

1. Troubleshooting the XS5000 (1 day)
   - Possible error messages
   - Corrective actions
2. Principles of computer operation (2 ½ hours)
   - Comparison to other systems
   - Advantages of the XS5000
3. Managing a job (1 hour)
   - Batch
   - Interactive
   - Initiation
   - Tracking
   - Queue control
4. Operator commands (1 ½ hours)
   - List of commands
   - When to use

Course X is structured logically in several ways. Main topics are presented in a logical order, beginning with an overview of the system, followed by instruction on how to operate the computer, and ending with the complex task of troubleshooting. Subtopics are also sequenced logically. For example, **User interface** teaches start-up procedures and menus before how to get help after getting started on the computer. In addition, this course allots time to lessons sensibly. The overview (30 minutes) is brief and more complex lessons have considerably more time.

Course Y is not structured logically. The course begins by teaching how to troubleshoot a system (lesson 1) when students have not yet learned how the system works (lesson 2) or the operator commands (lesson 4). This sequence would be very confusing for learning how to operate this computer system.

Guideline 3: Can you measure the learning?

How will you know if your employees learned what the training developers said that they would learn? The only way to know whether your training dollars were well spent is if your employees can demonstrate what they learned. Developers often tout a program as being "outstanding," but they usually don't provide a way to measure exactly what was learned.

This guideline works with the first guideline, ***Are the training objectives specific?*** Programs with well-defined training objectives are easier to measure and often include a way for you to measure whether your employees have achieved the objectives. These measures can be tests, practical exercises, or other forms of ongoing assessments.

What to look for

- ✓ Are tests given during or at the end of the program to measure learning?
- ✓ Are practical exercises incorporated into the program?
- ✓ Does the program ask students to explain or demonstrate periodically during training what was taught to them?

Some examples

The tables on the following pages provide examples of some good and poor ways of measuring if the objectives were met.

Good ways of measuring

The training objective	*A measure of learning*
To use "Happy Hotel Reservation System" to assign hotel rooms.	Have the trainee process 10 hypothetical reservations and assign guests to unoccupied rooms using the "Happy Hotel Reservation System."
To replace a worn brake shoe on a car.	Have the trainee jack up a car and, using the proper tools and procedures, remove the worn brake shoe and install a new one.
To recognize sexual harassment in the workplace.	Have the trainee view videotaped scenarios and distinguish incidents involving sexual harassment from those that do not.
To overcome customer objections to the negative aspects of a product by pointing out its features and benefits.	Have the trainee overcome the "customer's" scripted objections in role playing.
To distinguish among hazardous-material warning labels and apply the appropriate ones to chemical containers before shipping.	Have the trainee match appropriate warning labels to chemical names.

These are all good measures of learning because the trainees demonstrate through their behavior that they have learned how to perform or have understood what was intended to be taught.

Poor ways of measuring

The training objective	*How it was measured*
To operate a drill to remove rust from metal.	The trainees were asked to list the advantages of the new machine over the old one.
To conduct personal sales interviews.	The trainees were given a test that required them to write what their opening statement would be.
To design promotional brochures for a company product.	The trainees were expected to write a business letter to an hypothetical customer describing the features of the product.

In contrast, this table illustrates poor ways of measuring learning. They are poor measures because they do not relate to the objectives of the training. For example, if you want to know if the course you paid for effectively taught an employee to use a drill to remove rust, the best measure of learning is seeing if the employee can remove rust, not list advantages.

Guideline 4: Does the training method suit the content?

Training can be presented in many different ways, such as

- lectures,
- videotapes or films,
- self-study programs,
- overhead transparencies or slides,
- textbooks,
- computers,
- case studies,
- role playing, or
- group discussions.

Some training and education programs may incorporate two or more of these methods into the program. Each method is effective for teaching information and skills, but each has advantages and disadvantages. Self-study programs, for example, give trainees the opportunity to proceed at their own pace, but don't give them the chance to ask questions.

For the program to be effective, the methods used to teach the course must suit the content. For example, trainees learning a new software program must have the opportunity to practice; they need time on a computer with the new program. Hearing a lecture, even with visuals that illustrate menus or keystrokes, will not be as productive. In contrast, a training course that teaches interpersonal skills will be more effective if the instructor uses role play to allow trainees to act out situations.

What to look for

The appropriateness of the training methods is best judged by reviewing the actual course materials or by observing the course being presented to another group. Common sense will serve you well.

- ✓ Think about the objectives of the program and what you expect employees to be able to do after training.
- ✓ Look at how the program presents training and judge if it is a good way of teaching.

Some examples

If you wanted to purchase a program to teach sales skills to employees, which training methods would be more effective?

A Using a written self-instructional course

B. Using role playing to simulate sales situations

C. Hearing a lecture on how to make a sales presentation

D. Watching sales presentations on videotape

Methods B and D would be more effective. Because selling is a skill that requires interaction between people, role playing would give your employees actual practice in using these skills. In the same way, watching and hearing sales presentations on videotape demonstrates different sales situations and would, therefore, be a good second choice. However, hearing a lecture about selling or completing a written course wouldn't give employees an opportunity to practice with actual sales skills.

Here are other courses along with examples of effective and less effective training methods.

To teach a word-processing system

Effective methods	*Less effective methods*
■ Practicing on a computer	■ Using role playing
■ Using visual materials to illustrate menus and screens	■ Using group discussions
	■ Using case studies

To teach what Total Quality Management is

Effective methods	*Less effective methods*
■ Hearing a lecture	■ Using a computer
■ Using case studies	
■ Using a textbook	

Guideline 5: Does the program allow active participation?

People learn best when they actively participate in the training process, by being asked questions, doing exercises, or role playing. The most effective programs will require that your employees *do* something during the program. These programs usually intersperse activities with the presentation of the course content.

The opposite of active learning is passive learning, which occurs when students simply listen to a lecture or watch videotapes without a chance to practice the skill or to question the information being taught. In general, avoid programs that use passive learning in adult training.

What to look for

During the presentation of training there are a number of ways to get trainees to participate actively. You should examine programs for things like the following:

- ✓ Opportunities for questions and answers
- ✓ Use of group discussions
- ✓ Practical exercises
- ✓ Role playing
- ✓ Opportunities to practice the skills being taught
- ✓ Intermittent quizzes with discussions of the results

Some examples

- An instructor asks trainees questions that are designed specifically to stimulate thinking during the program. Such questions may encourage participants to dispute a teaching point, to explain why a point is valid, or to relate the point to their own work environment.
- Participants practice a skill that was described or demonstrated, such as using a computer program,

writing a sales letter, installing a part, or acting in a role-playing exercise.

- At designated points in training, participants break into groups to discuss the information presented in a lecture or film, or to use the material presented to work together to solve a hypothetical problem.
- An instructor stops a videotape at key points to ask participants to comment on the material.

Guideline 6: Does the program use examples and materials from the employee's job?

People learn best when new material can be associated with information they already know. A course that uses relevant examples from the participant's job will be easier to remember and absorb than one that does not. In addition, such a course can give a participant more ideas about how the material could actually be used on the job.

When participants come from many different companies, however, it's difficult to tailor the program to everyone. Such programs are usually taught on a general level. Although the examples in these courses may not be very relevant to any of the individuals in the course, there are methods to overcome such constraints.

What to look for

- ✓ At the beginning of the program, do participants have an opportunity to explain why they are taking the training?

  Knowing the personal objectives of the participants allows the instructor to adjust the program to best meet the needs of those attending.

- ✓ Are the participants told how this training fits into their job?

  At the beginning or end of the program, the instructor should give participants an overview about how the course can be used in their specific jobs.

- ✓ Does the program use examples from the participants' work?

  A good program will tailor the examples and exercises to actual job situations provided by the participants.

- ✓ Does the program use materials from the employee's job?

  Many programs encourage participants to bring materials or projects from their workplace to use and discuss during the course.

Some examples

- A program on computer spreadsheets uses salary information from an actual company to demonstrate creating a budget.
- A program teaching safety procedures uses specific examples from the participants' experience.
- A program teaching sales techniques uses the products or services actually sold by the participants to practice new techniques in upgrading or crossover.
- In a course for supervisors, participants bring their companies' performance appraisal forms for an exercise on evaluating an employee's performance.
- In a writing course, participants bring actual documents from work to be critiqued and improved during the class.

7. Do employees get feedback on their performance?

Feedback is critical in the learning process. People must know how they are doing in order to improve. Because instructors are usually experts in their fields, feedback from them ensures that participants are well-trained.

There are two types of feedback: positive and negative. Positive feedback reassures employees that they are performing well or that they are improving. Without that encouragement, some employees might become frustrated and give up. Negative feedback ensures that employees understand how their performance can improve. Giving negative feedback guards against promoting bad habits. Employees should not be led to believe they are doing well when they are not.

Feedback can be given in many different ways during the course — by the instructor, by other participants, in the course material itself, or through testing.

What to look for

- ✓ Does the program include planned times for feedback from the instructor?

  If the class is large, the instructor could move around the room during an exercise session, working with participants individually.

- ✓ Do participants give feedback to one another?

  Instructors may use a structured method, such as a checklist, for participants to give feedback to one another during exercises.

- ✓ Are the exercises designed so that the participants will know whether they are performing correctly?

  Software programs or manufacturing equipment often give negative feedback in the form of error messages when a procedure isn't followed correctly, and positive feedback in the

form of a document printed successfully or a correctly shut down machine.

✓ Does the program include tests to assess performance?

Studies show that quizzes during a course help students to remember material better. The quizzes may be informal, where participants check their own answers to get feedback on how they are doing.

Some examples

- In a writing class, the instructor schedules a half-hour session to discuss each participant's work.
- In a management course, the instructor uses counseling sessions to provide feedback on each participant's strengths and weaknesses.
- During an active listening exercise, participants use a checklist to observe how well other participants actively listen. At the end of the exercise the observers share the results.
- A course on safety has frequent quizzes graded by the participants to be sure they have grasped safety issues.
- A written self-instructional course gives answers to quizzes and practical exercises in an appendix.

4

After the training . . . How do you make it last?

You selected a program and have given an employee the time to take it. But the success of that program is not out of your hands. Most employees return from training with new skills and renewed motivation. What can you do to guarantee that the skills and the motivation aren't wasted? How can you maximize training's effectiveness? How can you make it last?

Part of the answer lies in what you do before an employee is sent to training. The employee's supervisor should be actively involved in selecting the program and planning with the employee what could be gained from it.

What to do

After the employee returns there are several things that can be done.

✓ Talk about the course.

As soon as employees return from training, talk to them about the program itself and what they learned. The information will not only help you determine whether the course was as good as you anticipated, but will also help supervisors use their employees' new skills to the best advantage. Some questions you might ask are

- What were the most important things that you learned?
- What did you learn that might be useful for other staff members?

39

- How can we use the new methods you learned in our company?
- Can we adapt these new methods to better fit our company?
- How can we plan your work over the next few months so you can apply what you've learned?

You may find it helpful for the employees to fill out a training report to help them focus on their new skills and to help them plan how best to use those skills.

✓ Talk to the supervisor about the new training.

Make sure that the employees' supervisors are aware of the employees' new skills. If supervisors insist that newly trained employees continue to perform tasks in the established way, the training will have been wasted.

✓ Give the employee an opportunity to use new skills.

If an employee is learning to operate a new piece of equipment, make certain that the equipment is available when training is complete. If new machinery won't be delivered for several months, the benefits of training will be diminished.

As employees use their new skills, realize that there may be some mistakes as everyone adjusts to new procedures. Give encouragement and feedback to reinforce the new skills.

✓ Reflect on the original need that prompted you to seek training.

After a period to time, ask yourself if the situation has improved. You may want to evaluate your employee's performance to see if their skills have improved. Or, if a sufficient number of employees attended the program, you may want to look at the entire group's performance.

The checklist . . .
How do you use it?

To select the best training and education programs that satisfy your company's needs, follow these steps for using the checklist on the following page to analyze and compare programs.

To begin, photocopy the ***Checklist,*** and then, follow these steps.

1. Fill out the section ***Your company's expectations and limitations*** according to your company's needs.

2. Look for the answers to each ***Guidelines*** question in the material that you have collected about each program. Rate each program in whatever way best serves your purpose.

   - For some training needs, you may want to assign a number from 1 to 5, to indicate how well a program answers each question. Then, add the ratings in each column.
   - For other training needs, you may only want to place checkmarks next to the guidelines that each program fulfills. To select the best program, count the number of checkmarks in each column and give more weight to programs with the most checkmarks.

41

3. Compare the training objectives of each program with your training expectations to decide whether the program meets your needs. To compare the programs, rate each one by assigning a number from 1 to 5 and entering the number in the appropriate blank.

4. Fill out the section ***Program details*** by providing the training cost, travel cost, dates available, times available, and location for each program. Enter this information in the appropriate blanks.

5. To choose the best program, look at how you rated each program and how each one meets your training expectations. You also need to compare how well the costs, dates, times, and location match the information you wrote in ***Your company's expectations and limitations***.

Checklist

Your company's expectations and limitations

Training expectations _____

Training budget _____

Travel budget _____

Date needed _____

Time of day needed _____

Location needed _____

	Program 1	*Program 2*	*Program 3*
Guidelines			
1. Are the training objectives specific?	____	____	____
2. Is the structure logical?	____	____	____
3. Can you measure the learning?	____	____	____
4. Does the training method suit the content?	____	____	____
5. Does the program allow active participation?	____	____	____
6. Does the program use examples and materials from the employee's job?	____	____	____
7. Do employees get feedback on their performance?	____	____	____
Total ratings	____	____	____
Does the program meet your training expectations?	____	____	____
Program details			
Training cost	_____	_____	_____
Travel cost	_____	_____	_____
Dates available	_____	_____	_____
Times available	_____	_____	_____
Location	_____	_____	_____